# Withholding Info W4/W5 – W-4 Election

Transaction Code:
PA30

**Purpose**        Use this procedure to maintain (change) an employee's W-4 or W-5 election.

**Trigger**        Perform this procedure when there is a change requested by an employee that affects their W-4 withholdings.

**Prerequisites**  The employees must be in active status.

**End User Roles** In order to perform this transaction you must be assigned the following role: Payroll Processor

| Change History | Change Description |
|---|---|
| 12/15/04 | Procedure created |
| 1/27/06 | Update |
| 5/14/09 | Update description of start date field |
| 1/11/10 | Updated screen shots to match current system.  Added note for Start date field if completing for a new hire. |
| 9/28/11 | Updated screen shot of *Withholding Info W4/W5 US (0210)* to reflect new fields |

**Menu Path**      Human Resources → Personnel Management → Administration → HR Master Data → Maintain

**Transaction Code**  PA30

| Helpful Hints | The Payroll Processor will use this procedure to update an employees' W4 or W5 Information. |
|---|---|

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The system may display three types of messages at various points in the process. The messages you see may differ from those shown on screen shots in this procedure. The types of messages and responses are shown below:

| Message Type | Description |
|---|---|
| **Error**  | **Example**:  Make an entry in all required fields. <br><br> **Action**: Fix the problem(s) and then click  (Enter) to validate and proceed. |
| **Warning**  | **Example**:  Record valid from xx/xx/xxxx to 12/31/9999 delimited at end. <br><br> **Action**: If an action is required, perform the action. Otherwise, click  (Enter) to validate and proceed. |
| **Confirmation**  or  | **Example**:  Save your entries. <br><br> **Action**: Perform the required action to proceed. |

# Procedure

1. Start the transaction using the above menu path or transaction code **PA30**.



2. Complete the following fields:

| R=Required Entry    O=Optional Entry    C=Conditional Entry | | |
|---|---|---|
| Field Name | R/O/C | Description |
| Personnel no. | R | The employee's unique identifying number.<br><br>**Example**:  40000186 |

3. Click (Enter) to validate the information.  Verify you have accessed the correct employee record.

4. Click the **Payroll** tab.

5. Select the box to the left of **Withholding Info W4/W5 US** to select

6. In the **Period** select the **All** radio button

7. Click (Overview)

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8. Click the box to the left of the record to be changed.

9. Click ⧉ (Copy)

10. As required, complete/review the following fields:

| Field Name | R/O/C | Description |
|---|---|---|
| Start (date) | R | If making a W4 change:<br><br>The Start date must be entered as the previous **Check Date[1] plus one day.**<br><br>**Example:** The previous Check Date was 12/23/2011, then the Start (date) will be entered as 12/24/2011.<br><br>**Note:** If this is for a **new hire** you would use the employee's **hire** date.<br><br>[1] **Check Date's** are listed on the HRMS Payroll Calendar http://www.dop.wa.gov/payroll/HRMS/PayrollCalendarSchedules/Pages/default.aspx which can be used to verify the **check date** as there are a few check dates that don't fall on the 10th or 25th . |
| Filing Status | R | This is a status elected by the employee for federal tax withholding.<br>**Example:** 02 |
| Allowances | R | This is the number of dependents claimed for tax filing purposes. It affects the amount of taxes withheld from an employee's paycheck.<br>**Example:** 1 |
| Add.withholding | O | This is an amount designated by the employee to be withheld from his/her check above the amount that will be taken due to filing status.<br>**Example:** 250.00 |

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11. Click ☑ (Enter) to validate entries.

12. Click 💾 (Save) to save.

ℹ️ The system displays the message, "Record Changed".

13. You have completed this transaction.

| Results |
| --- |
| You have successfully updated an employee's W-4 election while the employee is active. **Note:** This procedure details how to make a change to this infotype while the employee is in active status and either requests the change or is transferring to another agency. |

| Comments |
| --- |
| None. |